

Microsoft Academic Select License

Program Guide

Microsoft | Volume Licensing



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Academic Volume Licensing Overview

For education customers who purchase software in quantity and manage software across multiple computers, purchasing through volume licensing programs is an effective way to reduce the total cost of software ownership.

Microsoft offers both “transactional” and “subscription” volume licensing programs for education customers.

Transactional Licensing

With transactional volume licensing programs, you acquire perpetual software licenses (meaning your institution owns the licenses) while eliminating the costs and packaging of retail software.

Microsoft has two transactional volume licensing programs for education customers: Academic Open License and Academic Select License.

Academic Open License

Microsoft® Academic Open License is a widely accessible and cost-effective way for education institutions to license Microsoft software, starting with as few as five licenses. You simply determine the number of software licenses your institution wishes to acquire and place the order with an Authorized Education Reseller (AER). After obtaining licenses, media can be ordered from a Microsoft approved fulfillment source, eliminating bulky boxes and the associated expense. License confirmations are distributed electronically and posted on a secure site on the Internet.

Academic Select License

Microsoft Academic Select License provides volume licensing for institutions with approximately 250 or more PCs who are able to forecast their volume license needs over a three-year period. Your institution receives a volume price level for each pool of products selected (applications, systems, servers). Each product within Microsoft Academic Select has a point value assigned that allows your institution to establish a discounted price level by meeting a minimum forecast of license acquisitions. You receive a complimentary CD kit subscription containing the products covered by the agreement. Your institution may immediately reproduce and use these products based upon licenses acquired. Academic Select License is available through any Authorized Education Large Account Reseller (LAR).

Subscription Licensing

With subscription licensing programs, you have the right to run a selection of products, and any upgrades or downgrades of those products, for a designated term. For application, system, and Client Access License (CAL) products, even if the number of computers or users grows, you remain fully licensed throughout the designated term, and you only need to report increases on your FTE employees on your annual order.

Microsoft has two subscription licensing programs for education customers. Campus Agreement is for higher education institutions and offers the simplicity of counting people instead of computers. School Agreement is for K-12 schools and preschools and makes it easy to license all of a school's computers by counting them just once per year.

Subscription licensing offers many benefits, including:

- **Easy compliance** – Because all of your institution’s computers and users are covered throughout the subscription term, it’s easy to be sure that your institution is fully licensed for the products you’ve selected.
- **Low administration** – Subscription licensing eliminates the need to track licenses for the selected products on every computer. This is especially helpful for managing software assets in a decentralized environment.
- **Stay current on technology** – Subscription licensing allows your licensed users to run the most current version of the software products included in your subscription. Plus, your institution automatically receives installation media for application and system products that upgrade during your licensed term.
- **Simple budgeting and purchasing** – One annual payment covers all of the products you have selected for the year.
- **Excellent value** – By standardizing on a platform of products, you reduce your total cost of software ownership while increasing productivity and access to current technology. Software Assurance Membership—including support resources, tools, and eLearning courses—is included with your license coverage at no additional charge. You also receive one complimentary membership to the MSDN® Academic Alliance program.

Academic Select License Benefits

Academic Select License provides educational institutions with a flexible, volume-based, software license purchasing program. With Academic Select, you receive the following benefits:

- **Convenient license acquisition** – Academic Select License provides a simple monthly transaction model with regular confirmations of new licenses.
- **Easy to understand and comply** – You simply acquire and pay for the software license and Software Assurance as needed.
- **Obtain software for training purposes** – You may use up to 20 copies of most Microsoft software for evaluation and training purposes.
- **Investment value** – Through Software Assurance, you can easily stay current and (depending on whether you include Software Assurance on individual licenses or Software Assurance membership on a pool of products) receive additional benefits such as support resources and tools and eLearning courses.

Academic Select License Features

Forecasting

Qualification for Academic Select is determined by a forecast of the number of licenses you plan to acquire over the three-year term of the agreement.

Each year, on the anniversary of the Academic Select agreement, a customer's license acquisition for the preceding 12 calendar months will be reviewed to ensure they are meeting forecast requirements.

Product Pools

There are three product categories, called pools, from which you may elect to acquire software licenses: Applications, Systems, and Servers. Product pool categories enable you to aggregate the point values of a variety of similar Microsoft product licenses. Program qualification is established according to the total point value of product licenses forecasted within each pool. You may not combine point values for licenses acquired across pools. Points must be counted separately for each pool.

Applications pool

The Applications pool consists of Microsoft products such as Microsoft Office 2007, Microsoft Office Excel®, Microsoft Office Word, Microsoft Office Project, Microsoft Office Visual Studio®, and Microsoft Office Publisher.

Systems pool

The Systems pool consists of the Windows Vista™ Business Upgrade for desktop operating systems. New licenses for these products are available only through the Original Equipment Manufacturer (OEM) or retail channel.

Servers pool

The Server pool consists of Microsoft products that run on network servers such as the Microsoft Windows Server™ and server Client Access Licenses (CALs).

Price Levels and Point Minimums

With Academic Select License, you forecast your ability to meet the minimum point requirement in each pool. If the minimum requirement will not be met, that pool will not be established for volume purchases.

There is one Academic Select price level as outlined in this table:

Academic Select License Level	Point Minimums for 3-Year Forecast/Purchase per Product Pool
A	1,500

The point minimums per product pool can be satisfied by acquiring new Licenses (L), the License & Software Assurance Package (L&SA), or the Software Assurance (SA) part number for previously covered with Software Assurance.

Point values

Each Microsoft product is assigned a point value. A specific point value for each Microsoft product is listed in the product list. In some cases, a single product license equates to more than one point. A point value of two does not mean that you will receive two separate licenses; it means you will receive two points toward the forecast requirement.

Level minimums

The term of the Academic Select License 6.x agreement has increased over previous program versions from two years to three years. This term change is carried over to the point requirements of Academic Select License. As an example, under previous Academic Select License programs, the Level A point requirement was set at 1,000 points. By increasing the term from two years to three years, the new Level A requirement also changed and is now 1,500 points. This still reflects an acquisition rate of 500 points for each year of the agreement.

Example of Pools, Products, and Points

Applications	pts	Systems	pts	Servers	pts
Microsoft Office Professional	2	Windows Vista Business Upgrade	2	Microsoft Windows Server	15
Microsoft Office Excel	1			Microsoft Windows Server Client Access License	1
Microsoft Office Project	1				

Use this table of sample products and points for the example below.

Example: If a customer acquires, during the first year of their agreement, 300 licenses for Office Enterprise 2007 at 2 points each in the Application pool, 150 licenses of Windows Vista Business Upgrade at 2 points each in the Systems pool, and 6 Windows Server 2003 licenses at 15 points each with 550 Client Access Licenses (CALs) at 1 point each in the Server pool, they would have the following point totals:

Applications Pool

Office Enterprise 2007: 300 licenses x 2 points = 600 points. At the end of the first-year milestone, the customer has met at least 1/3 of the three-year forecast and qualifies to remain in the Academic Select program in the Application pool until the next milestone.

Systems Pool

Windows Vista Business Upgrade: 150 licenses x 2 points = 300 points. At the end of the first-year milestone, the customer has not met 1/3 of the three-year forecast and does not qualify to remain in the Academic Select program for the Systems pool.

Server Pool

Windows Server 2003 with CALs: 6 licenses x 15 points plus 550 licenses x 1 point = 640 points. At the end of the first-year milestone, the customer has met at least 1/3 of the three-year forecast and qualifies to remain in the Academic Select program in the Server pool until the next milestone.

Forecast Compliance Check

On an annual basis, Microsoft will review your actual acquisition history for the preceding 12 months against the forecasted price level for each product pool. For the first review, Microsoft will check the acquisition history to determine whether 1/3 of the forecast was met. This process will be repeated at the 24-month milestone also. If you have purchased less than the milestone quantity of the three-year forecast, then the agreement will be terminated for the relevant product pool(s).

Minimum Points Required for Academic Select License Program

Levels	End of Year 1	End of Year 2	End of Year 3
A	500	1,000	1,500

Software Assurance

When you acquire licenses through the Academic Select License program, you can enroll those licenses in Software Assurance. Software assurance helps you get the most for your software by providing the right to run any new release of a covered product during the term of the Academic Select License agreement. You also have access to eLearning content for your covered products.

Software Assurance Membership

Software Assurance Membership is a benefit given to organizations that acquire Software Assurance for every new license purchased within a specific product pool (applications, servers, or systems). Software Assurance Membership entitles you to additional benefits, such as:

Life-Cycle Stage	Overview	Benefits
Stage 1: Plan	Build your technology roadmap, budget more effectively, and simplify the software procurement process	<ul style="list-style-type: none"> • New Version Rights • Spread Payments
Stage 2: Deploy	Make IT professionals more productive with powerful preparation and installation tools	<ul style="list-style-type: none"> • Windows Preinstallation Environment
Stage 3: Use	Take advantage of the latest technology and build better deployment, migration, and management skills	<ul style="list-style-type: none"> • Windows Vista Enterprise • Microsoft eLearning
Stage 4: Maintain	Maintain a stable IT environment with services, tools, and reference materials that support networks and desktops	<ul style="list-style-type: none"> • Corporate Error Reporting • Cold Backups for Disaster Recovery • TechNet Plus and TechNet Managed • Newsgroups
Stage 5: Transition	Access technology and support benefits to help you transition your software	<ul style="list-style-type: none"> • Windows Fundamentals for Legacy PCs (new in 2006) • Extended Hotfix Support

For additional information regarding Software Assurance Membership benefits, please refer to <http://www.microsoft.com/education/SoftwareAssurance.aspx>.

Software Assurance Benefit Administration

You can manage your Software Assurance benefits at the Microsoft Volume Licensing Service (MVLS) Web site at <https://licensing.microsoft.com/>. Information on how to access MVLS and how to receive these benefits is sent to all Software Assurance customers.

If you require additional assistance with using the MVLS site, please contact the MVLS Support Center at 1-866-230-0560 or e-mail mvshelpa@msdirectservices.com.

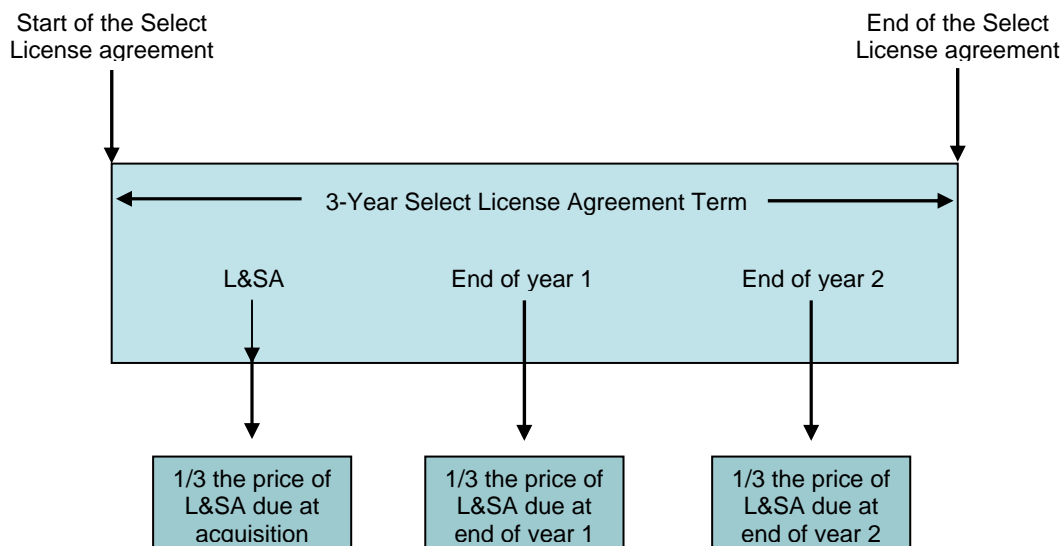
License Acquisition and Payment

When you choose the Academic Select License program, you have multiple ways of acquiring and paying for your licenses. The first option is to pay for licenses at the time of acquisition. The other option enables them to split the payment of Software Assurance (SA) or License & Software Assurance Package (L&SA) into equal payments for the balance of the Academic Select License term. When you choose this option, Microsoft will break down the price of the SA or L&SA licenses into payments based on when during the term of the Academic Select License agreement the acquisitions were made.

For example, if you make the acquisition during the first year of the agreement, then you will have one payment at the time of acquisition and two additional payments at the second- and third-year anniversaries of the term of the agreement. Each payment will be equal and is not affected by price changes during the term. The Academic Select License program is available worldwide through an Authorized Education Large Account Reseller (LAR), and all final prices and payment terms will be determined by agreement between the customer and their LAR.

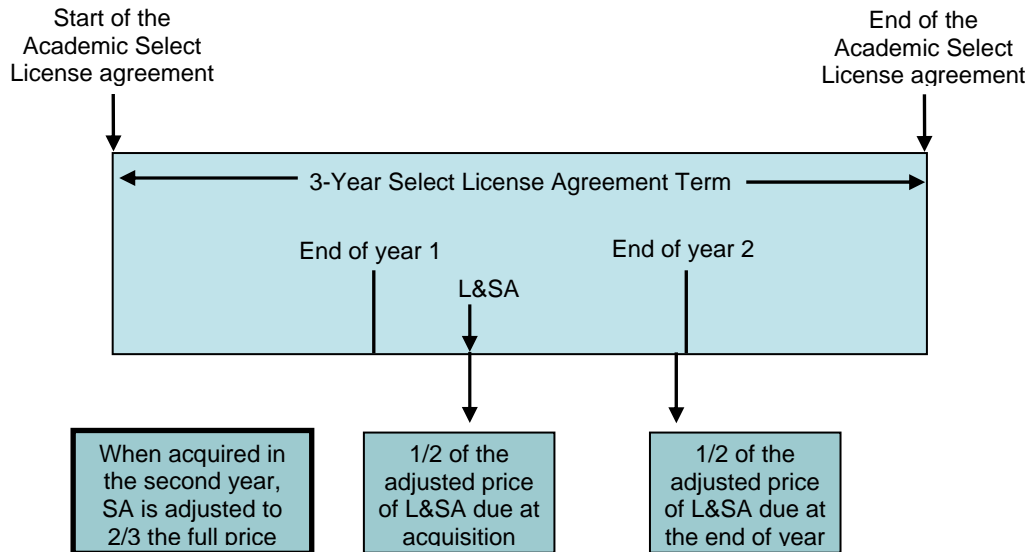
Acquisitions made during the first year of the agreement.

When acquisitions are made of L&SA in the first year, the payments may be annualized into three equal payments over the remaining term of the agreement. The illustration below shows the three-year payments for acquisitions made during the first year of the agreement.



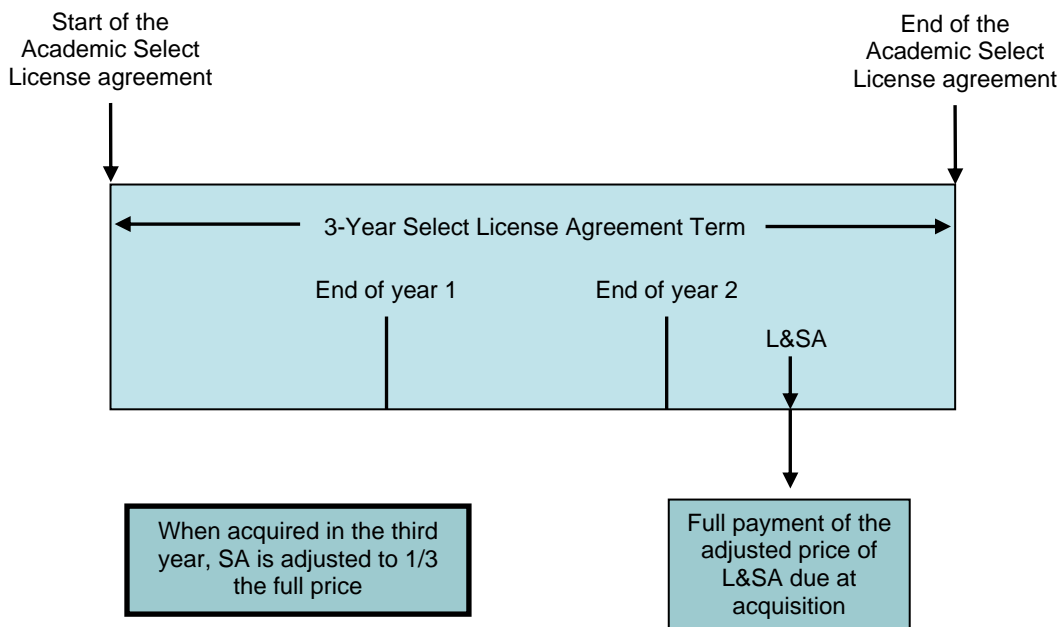
Acquisitions made during the second year of the agreement.

When L&SA is acquired in the second year, the price is adjusted and annualized over the two remaining years of the agreement.



Acquisitions made during the third year of the agreement.

When acquired in the third year, full payment is made at time of acquisition for the adjusted amount.



Receiving Academic Select License Software

Upon receipt of the Academic Select License enrollment, Microsoft sends a CD-ROM kit to the contact listed on the enrollment. The CD-ROM kit contains CDs with all the products offered to date by Microsoft Academic Select License. Enrolled affiliates will automatically receive a CD-ROM update kit every month until the end of the Academic Select License agreement. The update kits contain only the pools that the enrolled affiliate specified on the enrollment at the time. Additional subscriptions may be ordered through their LAR for an additional charge.

You may also download licensed software from the Microsoft Volume Licensing Service (MVLS) Web site at <https://licensing.microsoft.com/>.

Product Specific—Pools and Product Groupings

CDs for the three pools are subdivided into nine groupings to enable you to select those product groupings for which you require media fulfillment. For example, if you do not need developer applications or Microsoft Press® titles, you can choose not to subscribe to these and reduce the number of CDs you need to manage.

The three pools, with some typical examples, are as follows:

Applications Pool

- Microsoft Office Family – Office suites and applications such as Project, etc.
- Developer Tools – Visual Studio, Microsoft SQL Server™ Developer Edition, Office Developer, etc.
- Training and Learning – Microsoft Press titles, Microsoft Encarta®, etc.
- Products for Macintosh – Office for Mac, etc.

Systems Pool

- Windows Client: Business – Windows NT® Workstation, Windows Vista Business
- Windows Client: Consumer – Windows 98, Windows Millennium, IEAK, etc.
- Windows 3.1 and MS-DOS®.

Server Pool

- Windows Servers – Windows 2003 Servers and Windows NT Servers
- Server Applications – SNA, Proxy, Site Server, etc.

CD-ROM Kit Package

New Online User's Guide for Kit and Product Management	Simple and advanced search.
Interactive Product Search	Products available by group and language
Program and Policy Information	Previous model product mapping to new product
Fulfillment Ordering Details	Monthly postings to keep you informed, including details
CD Handling Guidelines	Current product releases by name, group, and language
Warranty Replacement Details	Current comprehensive kit content
Product Installation Instructions	Products removed from kit offering

Information published monthly on the User Guide Web site: <http://selectug.mslicense.com/>

License Administration

The Microsoft Volume Licensing Services (MVLS) site at <https://licensing.microsoft.com/> is an online resource to help you manage your Microsoft licensing agreements, access your licensing order information and purchase history, download software, and administer Software Assurance benefits.

From the site you can view your licensing information easily and in one place, including details about your Volume License agreements, license orders, and Volume License Product Keys. You can also download licensed software.

Student Select

The Student Select program provides Academic Select License 6.x customers the ability to purchase licenses and media for a limited selection of products and transfer them to students. These orders are placed using a special Student Select Enrollment under the Academic Select License 6.x Master Agreement.

Available Products

As of the publication of this guide, the following products are available:

- Microsoft Office Enterprise 2007
- Microsoft Office Professional Plus 2007
- Microsoft Office Standard 2007
- Microsoft Office 2004 for Mac Professional Edition
- Microsoft Office SharePoint Designer 2007
- Microsoft Office OneNote 2007
- Microsoft Office Project Professional 2007
- Microsoft Office Visio Professional 2007
- Microsoft Student with Encarta Premium 2007
- Windows Vista Business Upgrade*

Note: Software Assurance is not available for Student Select licenses.

*Upgrade license only; not a full license. Students who wish to acquire the Windows Vista Business Upgrade license through the Student Select program must first have licensed a qualifying operating system for their personal computer or workstation. For a list of qualifying operating systems, please refer to the Microsoft Volume Licensing Product List at <http://www.microsoft.com/licensing/userights>.

For an up-to-date product list, please visit <http://www.microsoft.com/education/StudentSelect.aspx>.

Downgrade Rights

Student Select licenses include the right to run a downgrade of the product. For instance, a student that acquires a license for Office Professional Plus 2007 may instead run Office Professional 2003. For this purpose, CDs can be ordered for the most current version or the previous version of the software.

Placing Orders

Orders for Student Select licenses and corresponding individual media are placed with the LAR using your Student Select Enrollment number.

Distributing the Software

Once you receive your student software (CDs), you'll need to establish a transaction point, such as your campus bookstore or computer store. Then have your students sign a Student Select License Agreement (Addendum A to the Enrollment), pay for the software and media (at prices determined by your institution), and pick up their applicable media (CDs) for the software. Student Select licenses cannot be transferred from the student to another party.

Minimum Requirements

You are required to reach 750 total points for Student Select purchases for all product pools. These points must be reached before the expiration date of the Master Academic Select 6.x Agreement under which the Student Select Enrollment is opened. This is in addition to the 1,500-point requirement for the Master Academic Select 6.x Agreement. Student Select points do not apply to your 1,500-point requirement.

Product	Pool	Point value
Office Enterprise 2007	Applications	2 points per unit
Office Professional Plus 2007	Applications	2 points per unit
Office Standard 2007	Applications	2 points per unit
Office 2004 for Mac Professional Edition	Applications	2 points per unit
SharePoint Designer 2007	Applications	2 points per unit
OneNote 2007	Applications	2 points per unit
Project Professional 2007	Applications	2 points per unit
Professional 2007	Applications	2 points per unit
Student with Encarta Premium 2007	Applications	2 points per unit
Windows Vista Business Upgrade*	Systems	2 points per unit

Example: 300 Office Enterprise 2007 licenses x 2 points per unit = 600 points for Applications pool.

Glossary

Affiliates

A company or legal entity that owns, is owned by, or is under common ownership with the customer.

Authorization number

The number assigned to the customer by Microsoft after initiating an Academic Open License account. This number allows for reorders for two years.

Authorized Education Reseller

A reseller that is authorized to sell Microsoft Academic Edition (AE) products to eligible academic customers.

CUP

A competitive upgrade license. This license allows a customer to acquire a version of a Microsoft product at a price based on ownership of an existing non-Microsoft product.

Distributors

An organization authorized by Microsoft to distribute Microsoft products to resellers.

eOpen

A secured proprietary Web-based site that provides Open customers access to Academic Open License account information.

L&SA

See License & Software Assurance Package.

License

The license that grants a customer the right to run a Microsoft software product as specified in the product use rights.

License & Software Assurance Package

The part number that combines the License and Software Assurance part numbers.

Microsoft

Microsoft Corporation or any of its affiliates.

Open License

In relation to Microsoft volume licensing, Open License is a volume license program for customers with a need for as few as 5 licenses. Open License refers to the rules and procedures of this acquisition option or to the software products acquired and to the agreement that grants rights to use the products depending on the context.

Points

A unit associated with each product used to qualify for Open Volume and Select License.

Product list

A document listing all Microsoft products available for acquisition under the Academic Open License.

Product pools

Microsoft products available through Academic Open License are categorized as applications, systems, and server products.

PUP

A product upgrade license. This license allows a customer to acquire a version of a Microsoft product at a price based on ownership of an existing Microsoft product of the same type. An example would be to upgrade from a standard version of a product to the professional version of the same product.

Reseller

Any organization providing the resale of Microsoft products to a customer.

SA

See Software Assurance.

Software Assurance

The part number that grants upgrades associated with a Microsoft product or service.

UA

See Upgrade Advantage.

Upgrade Advantage

A product license offered under a volume licensing program that gives a customer the right to acquire license upgrades for Microsoft products for which they hold a license during the term of the license agreement.

VUP

A version upgrade license. This license allows a customer to acquire a version of a Microsoft product at a price based on ownership of an existing previous version of a Microsoft product of the same type.

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